

Members

Sen. Joseph Harrison, Chairperson  
Sen. Thomas Weatherwax  
Sen. Allie Craycraft  
Sen. Larry Lutz  
Rep. Terry Goodin  
Rep. Thomas Kromkowski  
Rep. Larry Buell  
Rep. Richard Mangus  
Clarke Davis  
Steve Meno  
William Gettings, Jr.  
Connie Lux



# **PENSION MANAGEMENT OVERSIGHT COMMISSION**

*Legislative Services Agency*  
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LSA Staff:

James Sperlik, Fiscal Analyst for the Commission  
Peggy Piety, Attorney for the Commission

Authority: IC 2-5-12-1

Meeting Date: September 28, 2001  
Meeting Time: 10:30 A.M.  
Meeting Place: State House, 200 W. Washington St., Room 130  
Meeting City: Indianapolis, Indiana  
Meeting Number: 1

## **MEETING AGENDA**

- (1) Introduction of Commission Members
- (2) PERF/TRF Administrative Issues (Copy Included)
  - A. Changes Related to Pension Reform Provisions in the New Federal Tax Law
    1. Rollover Accounts
    2. Purchase of Service with IRA, 403 (B) Rollover
    3. Service Purchase Via Trustee Transfer from 403 (B) or 457 to Purchase Certain Types of Service
    4. Permit Purchase of Additional Years of Service
  - B. Other Administrative Changes
    1. Expressly Permit Commingling of Investment Funds of PERF/TRF (Proposed Amendment included)
    2. Revise Purchase of Prior Service Rules for Certain 1977 Fund Units
    3. Permit Members who are Age and Service Eligible for a Pension to Withdraw Annuity Savings Account (ASA) to Purchase Service
- (3) State Police Issues
  - A. State Police Pension Issues Cost of Living Adjustment (COLA) (Items included from Steve Buschmann of the Indiana State Police Alliance)
  - B. State Police Disability Plan (Items included from Steve Buschmann of the Indiana State Police Alliance)
- (4) Other Business
- (5) Next Meeting Date